



Scottsdale 2017 Visitor Research Presentation

TDC Meeting
November 20, 2018
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Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives

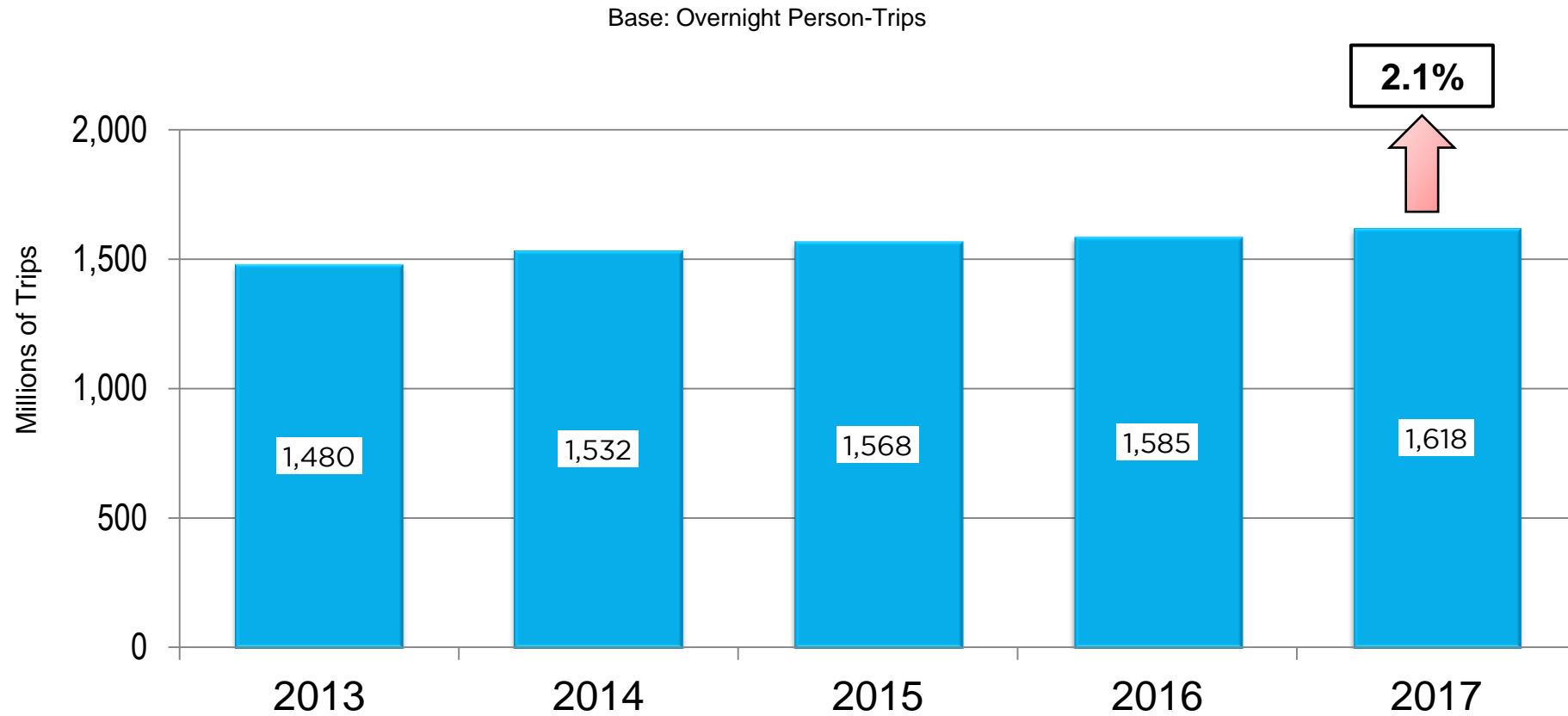
- **Leisure Trips:** Include all trips where the main purpose was one of the following:
 - Visiting friends/relatives
 - Touring through a region to experience its scenic beauty, history and culture
 - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
 - Special event, such as a fair, festival, or sports event
 - City trip
 - Cruise
 - Casino
 - Theme park
 - Resort (ocean beach, inland or mountain resort)
 - Skiing/snowboarding
 - Golf
- **Business Trips:**
 - Conference/convention
 - Other business trip
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.



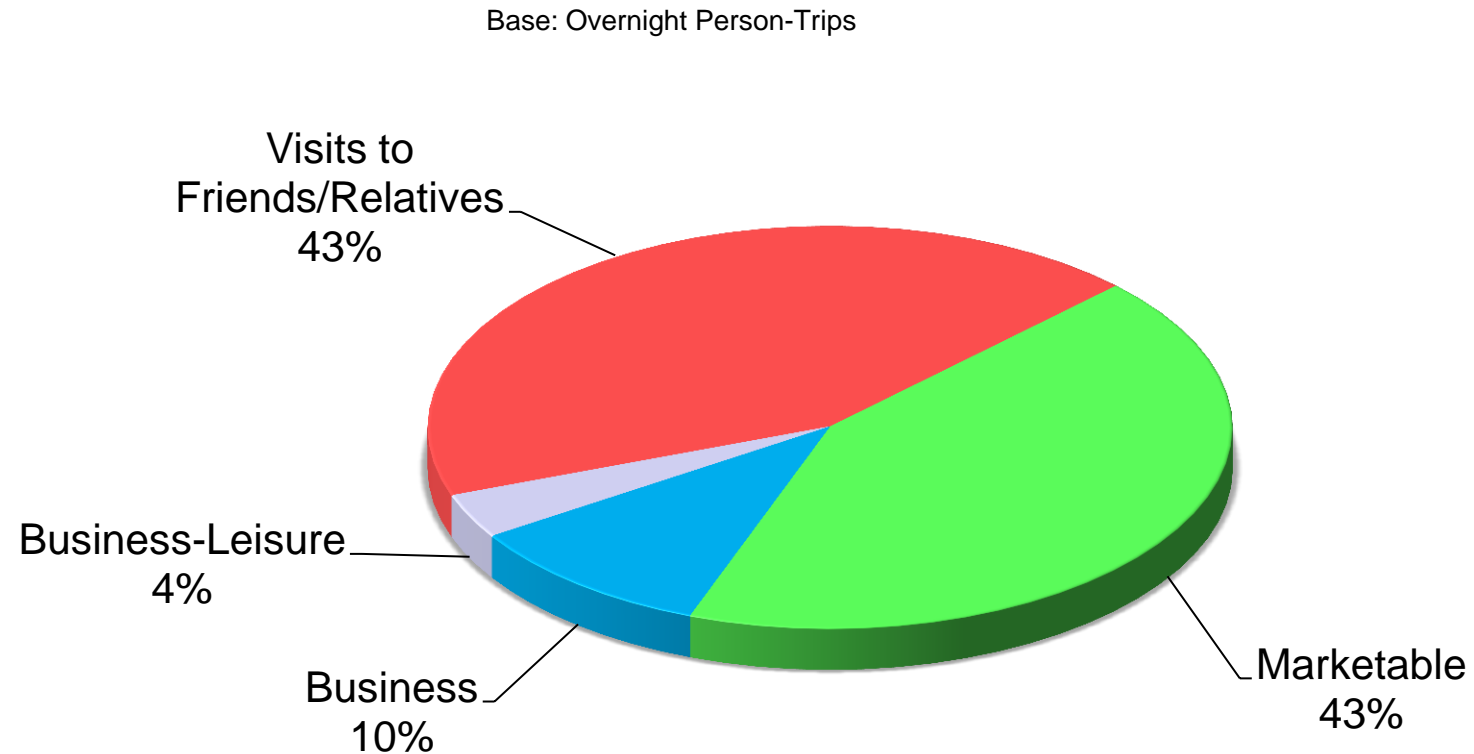
Size & Structure of the U.S. Travel Market



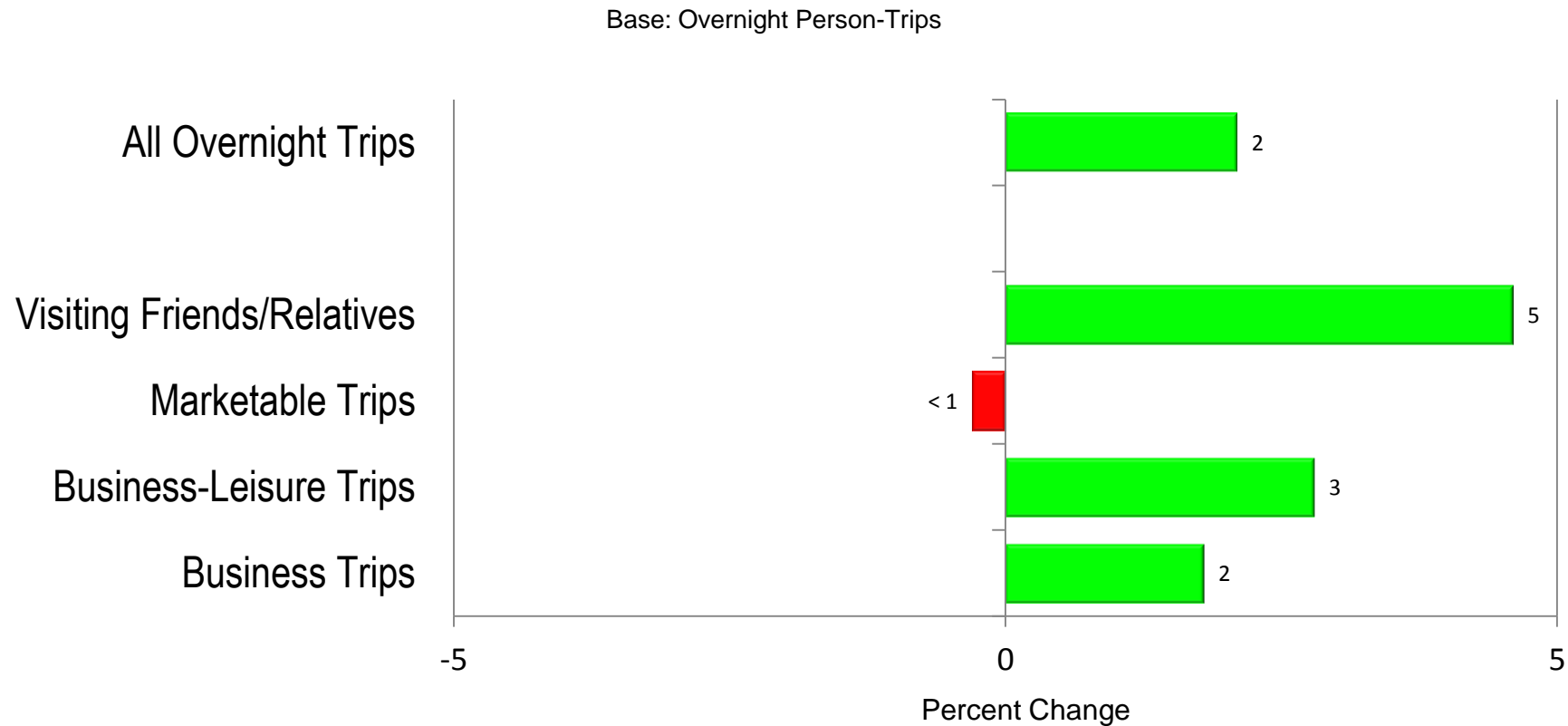
Total Size of the U.S. Travel Market — 2013-2017



Structure of the U.S. Travel Market — 2017 Overnight Trips



U.S. Market Trends for Overnight Trips — 2017 vs. 2016





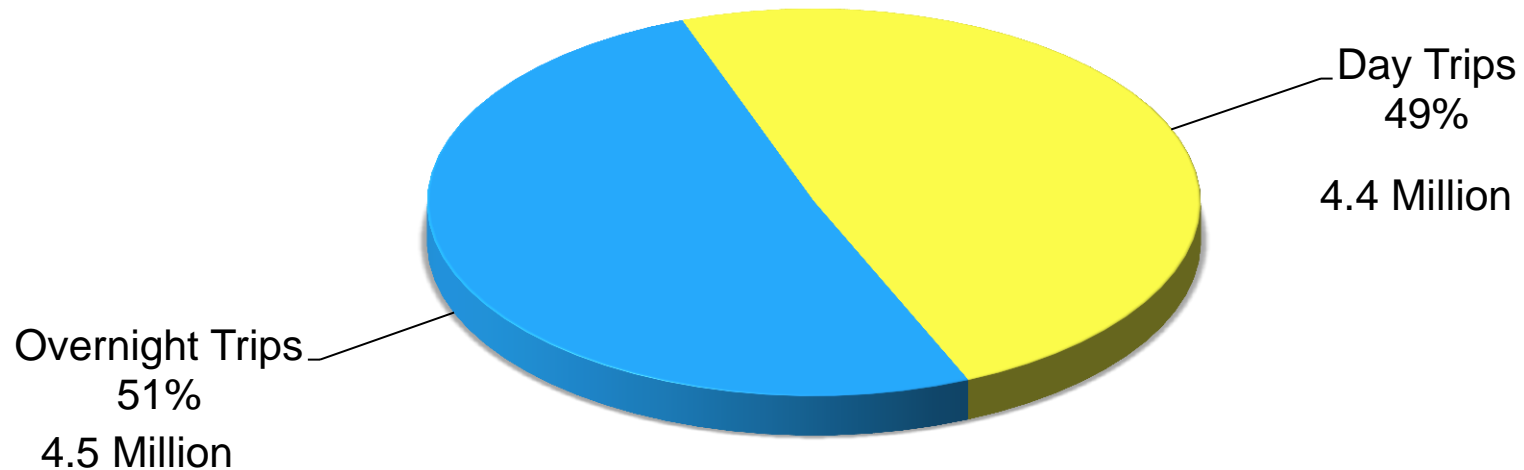
Size & Structure of Scottsdale Domestic Travel Market



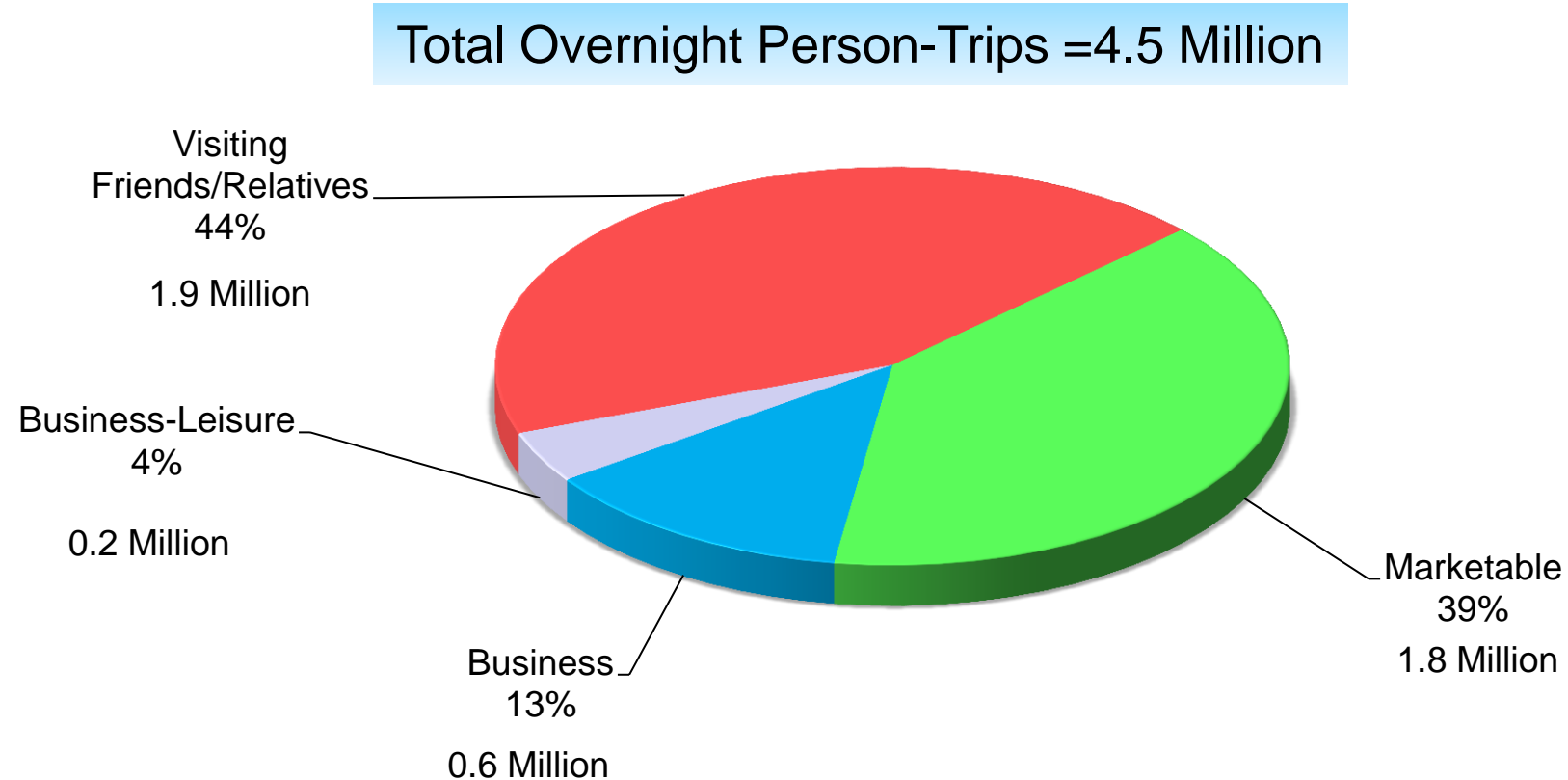
Total Size of Scottsdale 2017 Domestic Travel Market

Total Person-Trips = 8.9 Million

+1.6% vs. 2016



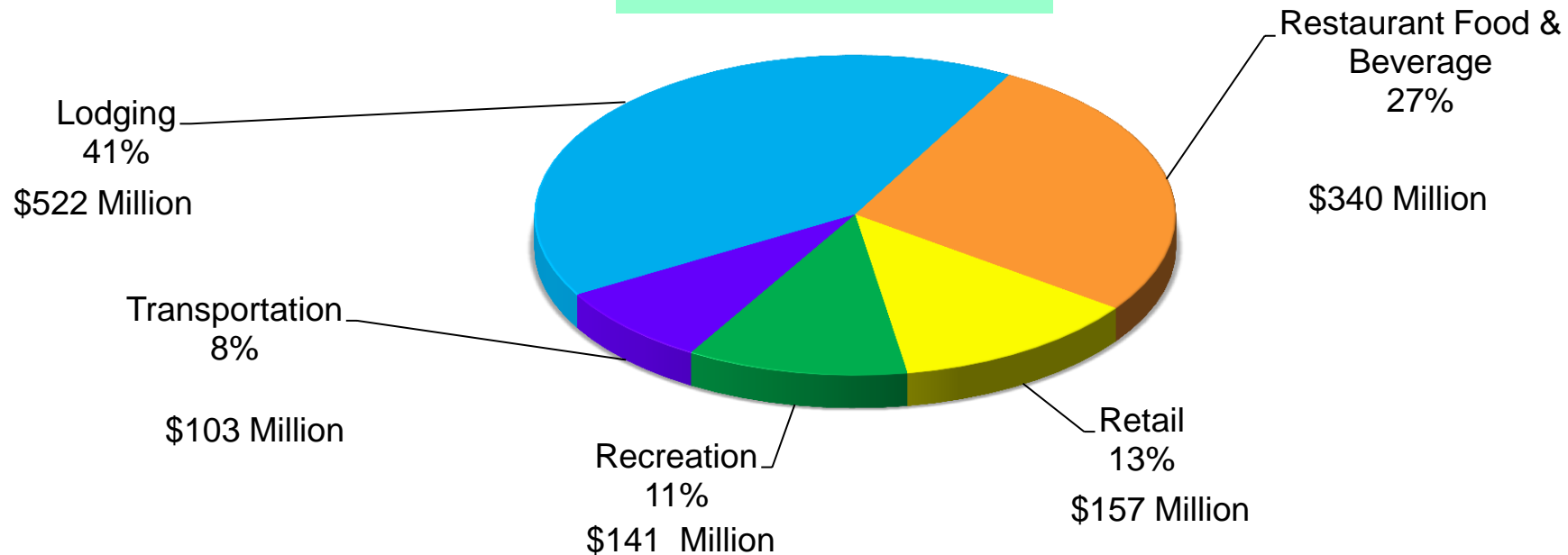
Scottsdale Overnight Travel Market — by Main Trip Purpose



Domestic Overnight Expenditures — by Sector

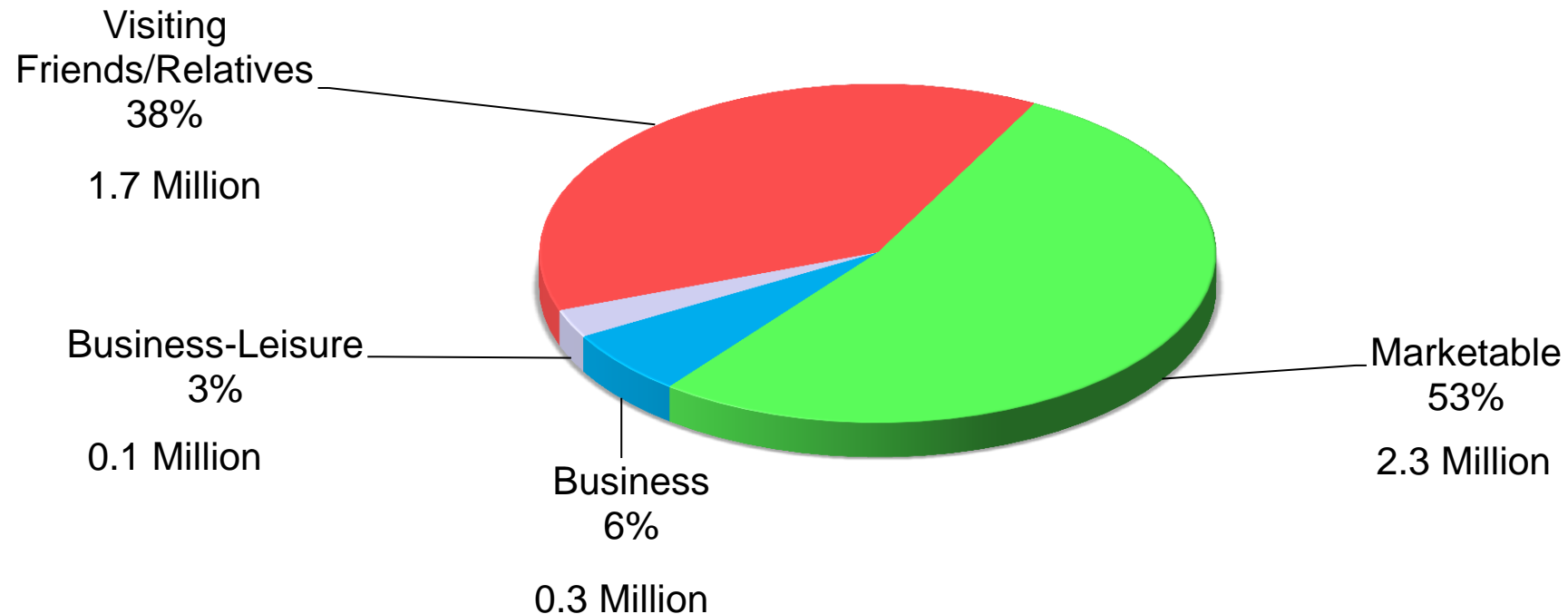
Total Spending = \$1.263 Billion

+3.0% vs. 2016

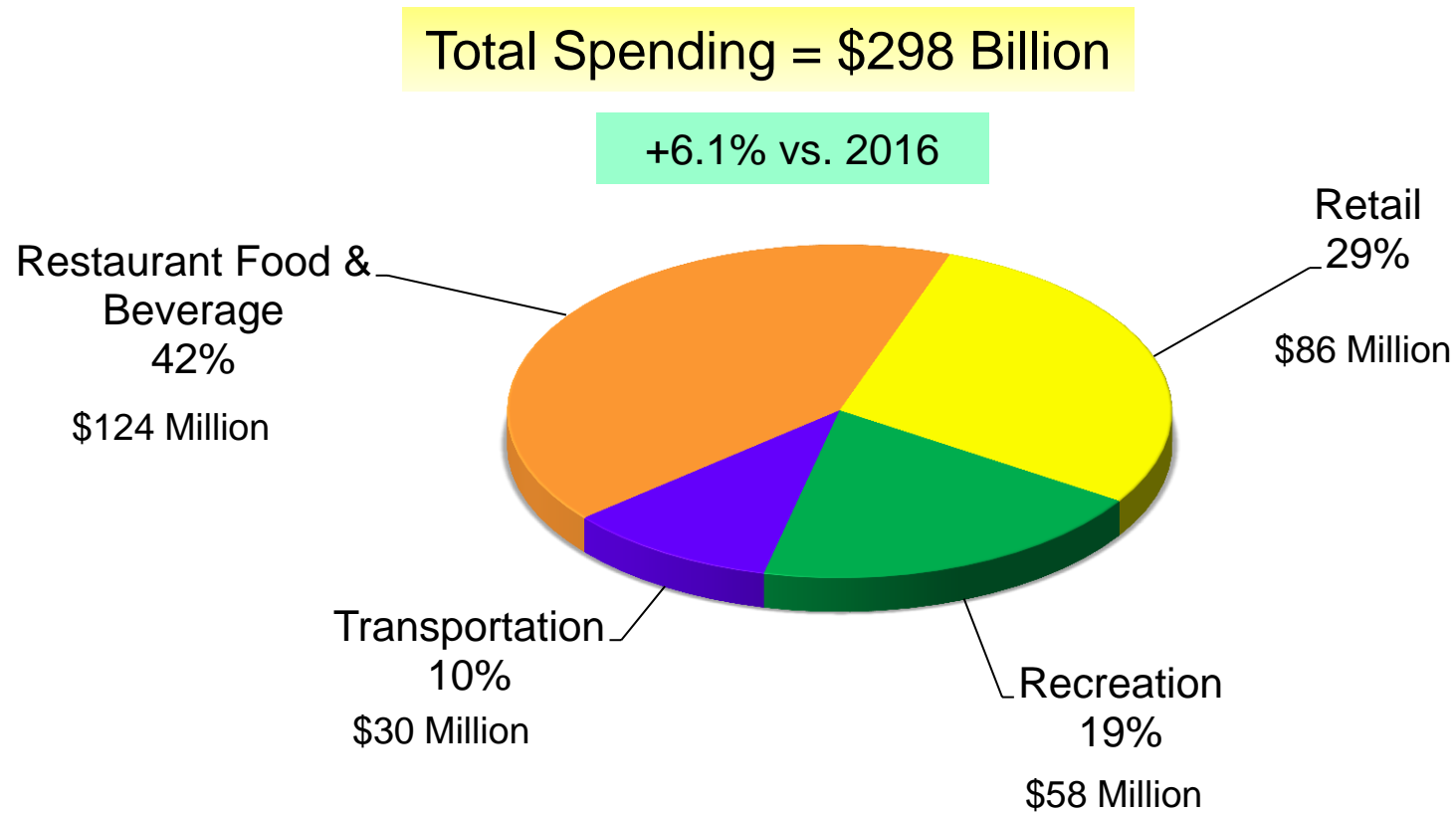


Scottsdale Day Travel Market — by Trip Purpose

Total Day Person-Trips = 4.4 Million



Total Scottsdale Domestic Day Trip Spending — by Sector



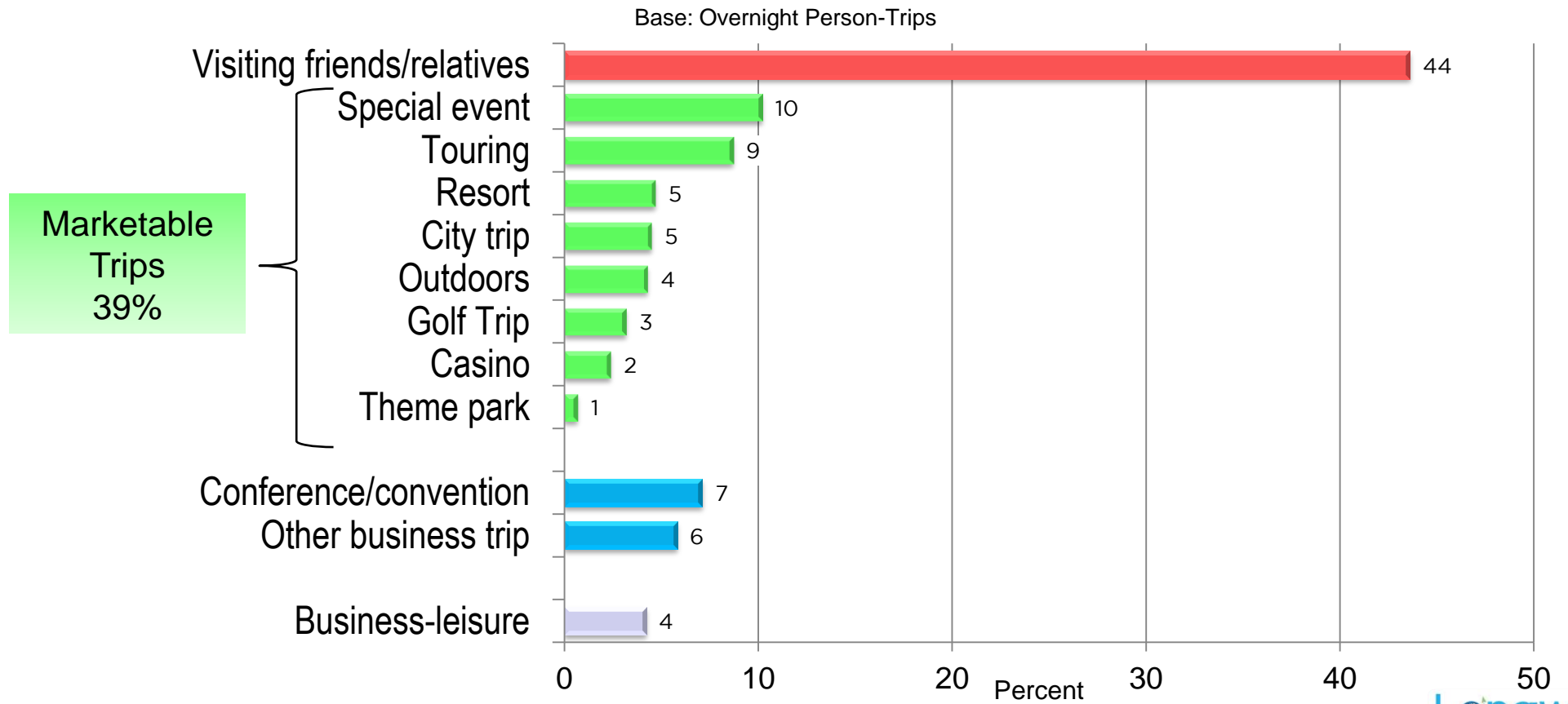


Longwoods
INTERNATIONAL
40 YEARS TOGETHER

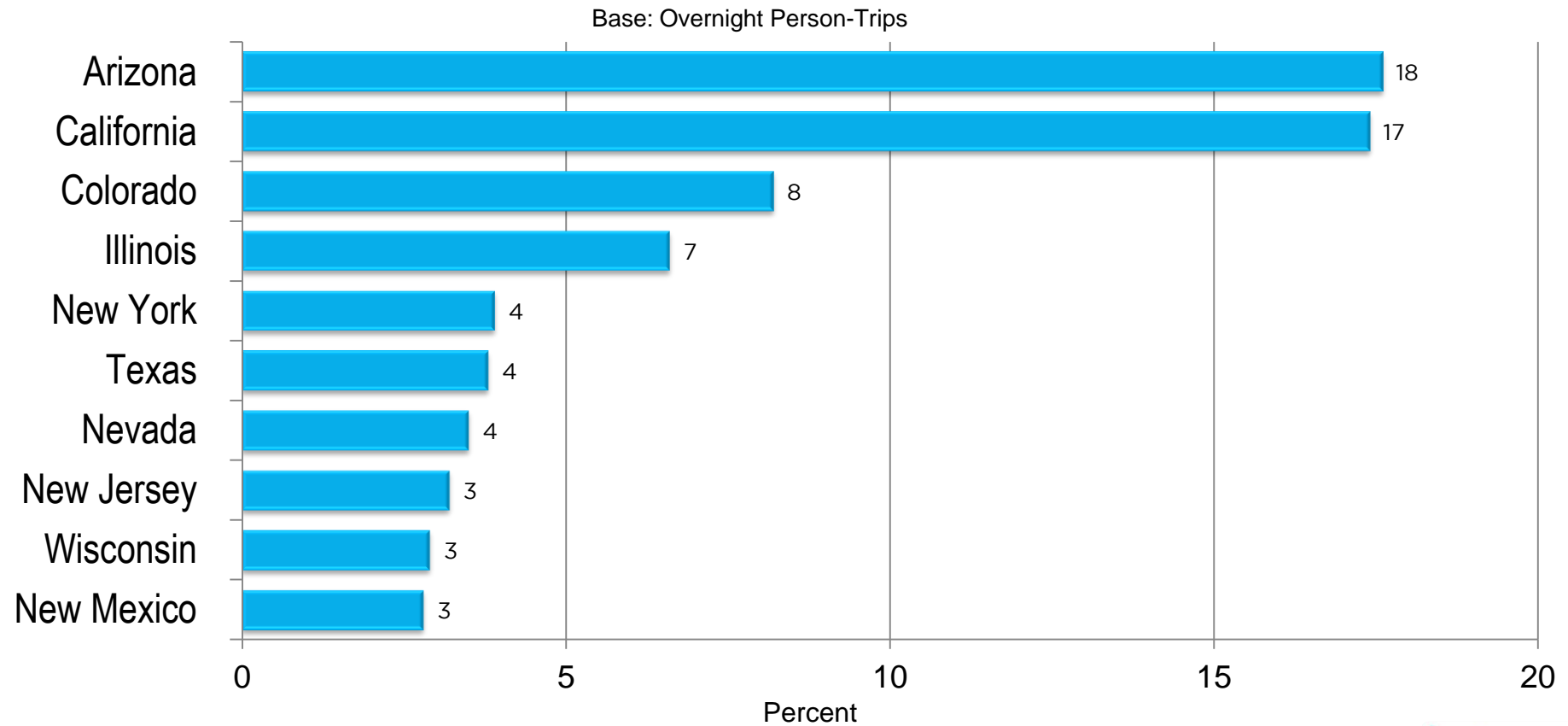
Overnight Trip Characteristics



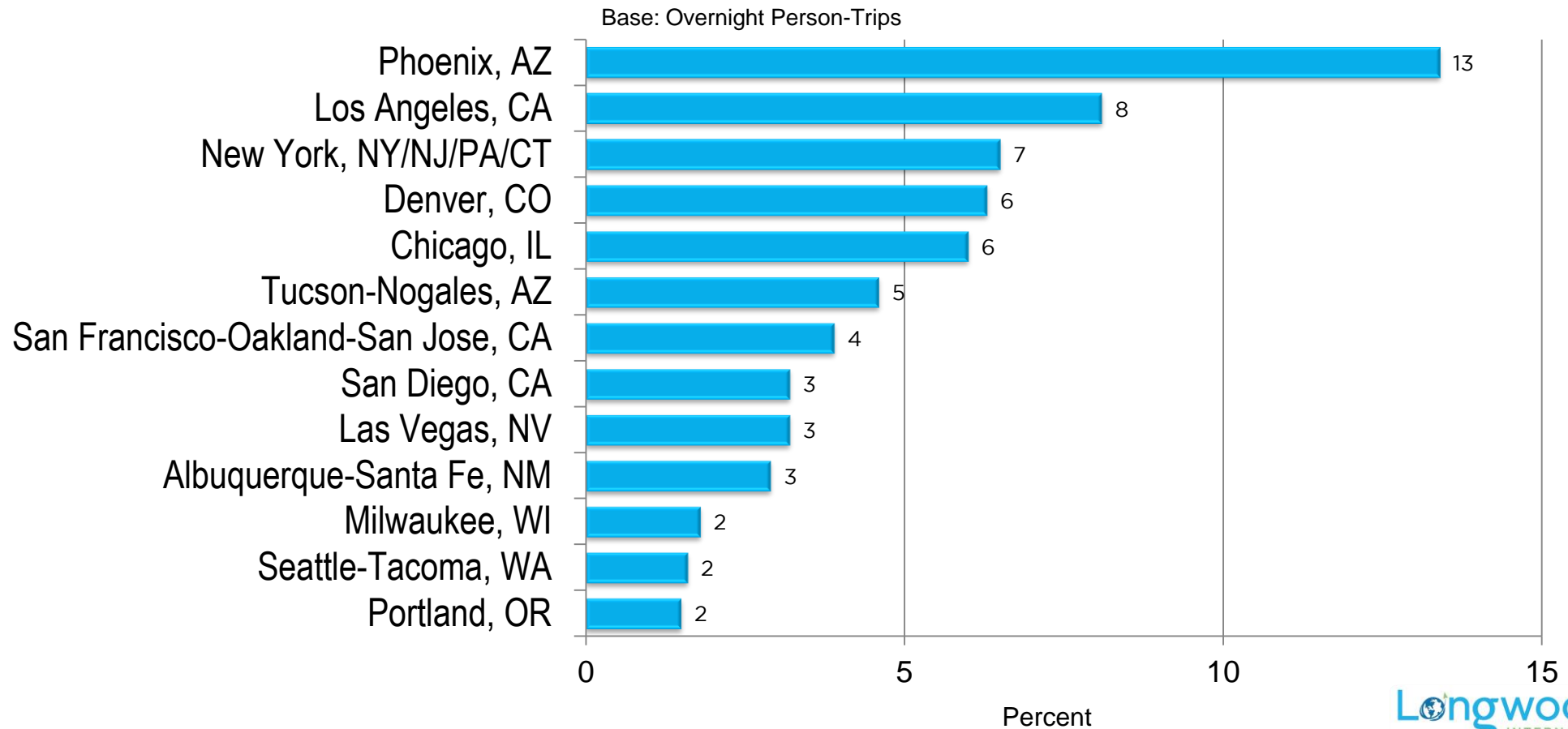
Main Purpose of Trip



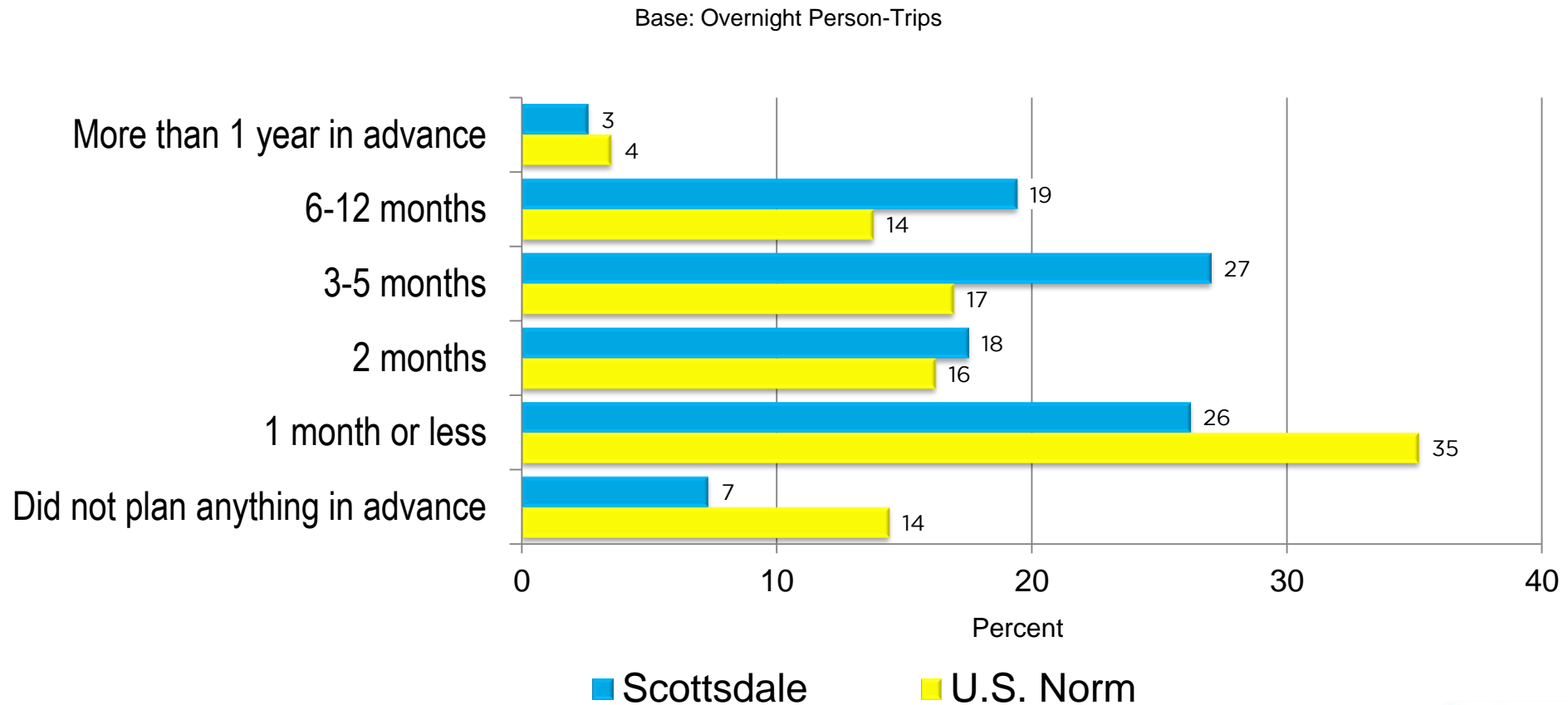
State Origin Of Trip



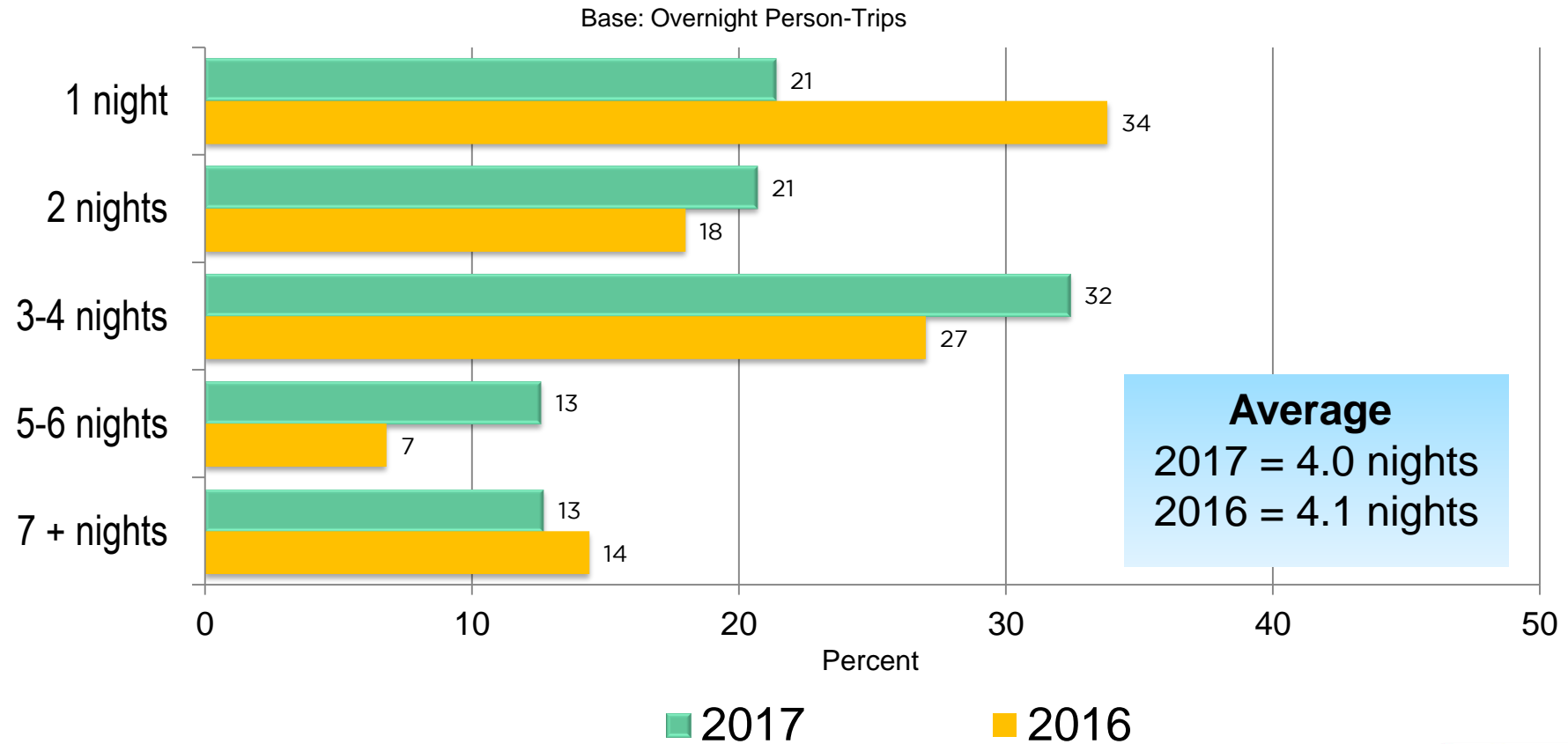
DMA Origin Of Trip



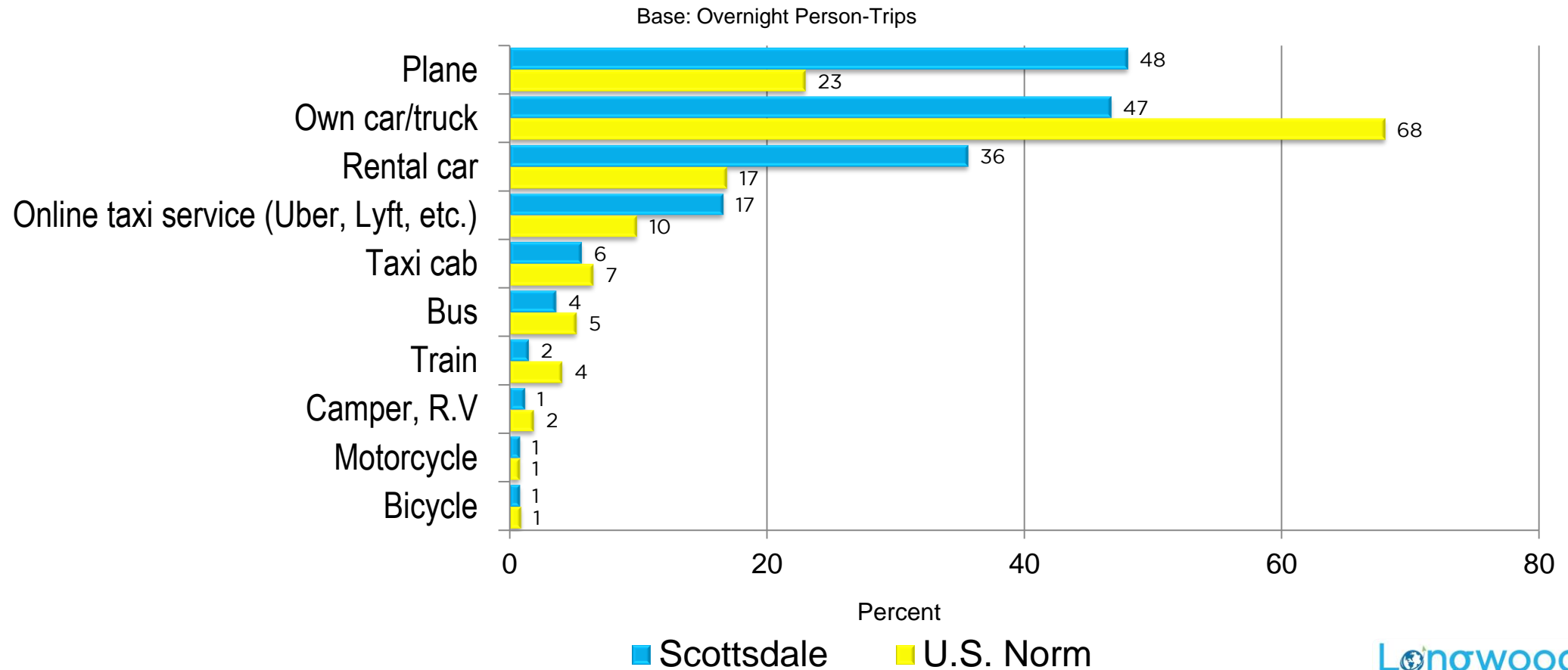
Length of Trip Planning



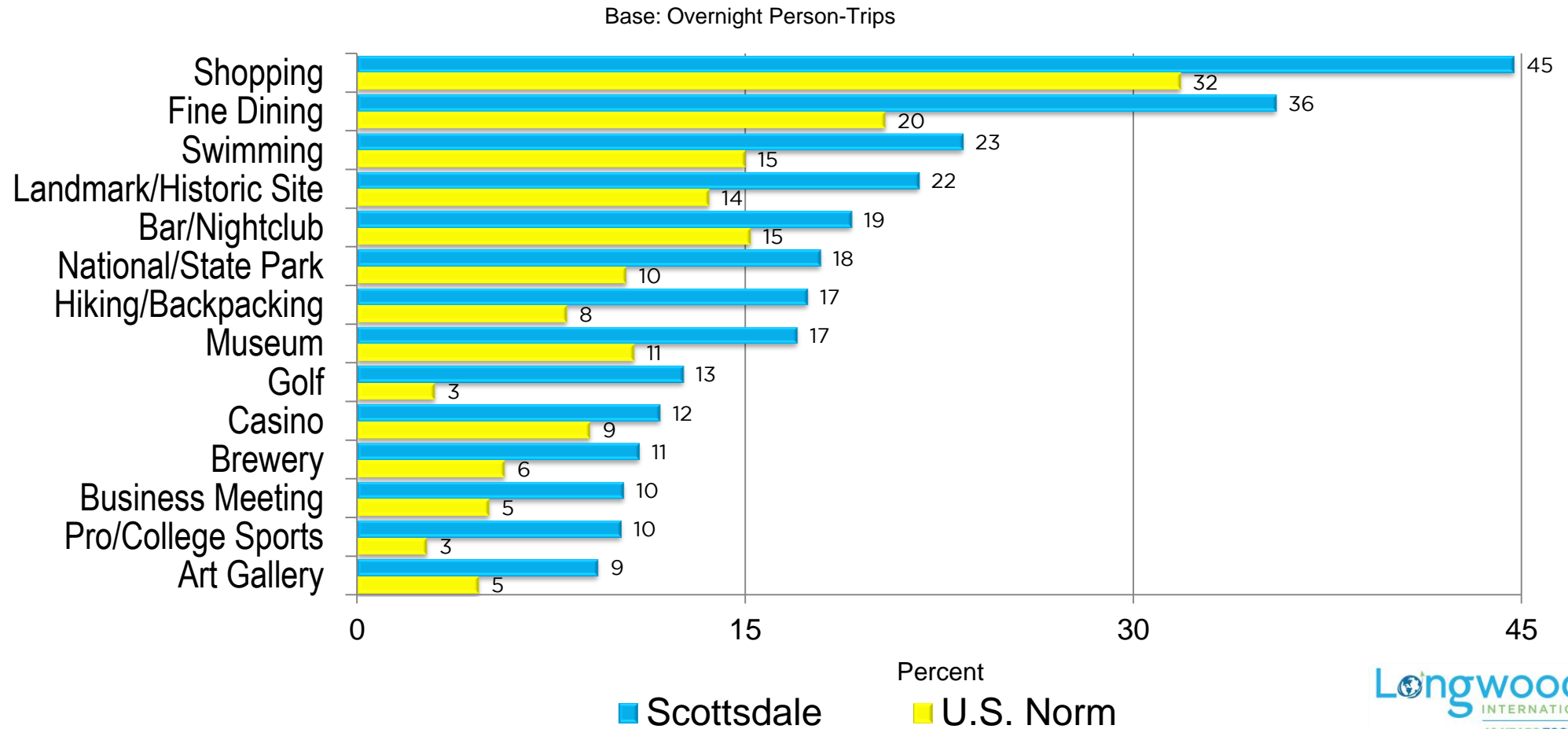
Number of Nights Spent in Scottsdale - 2017 vs. 2016



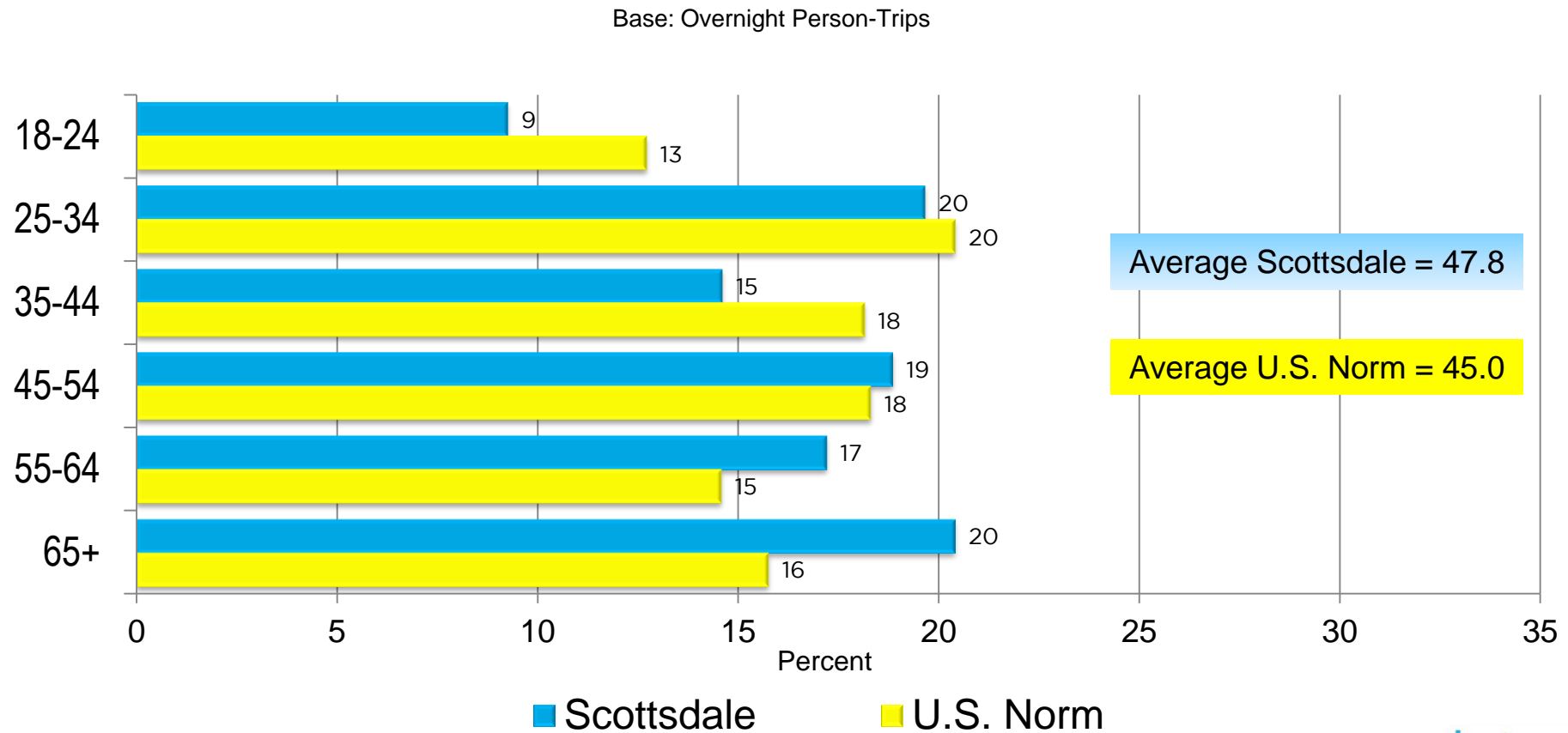
Transportation



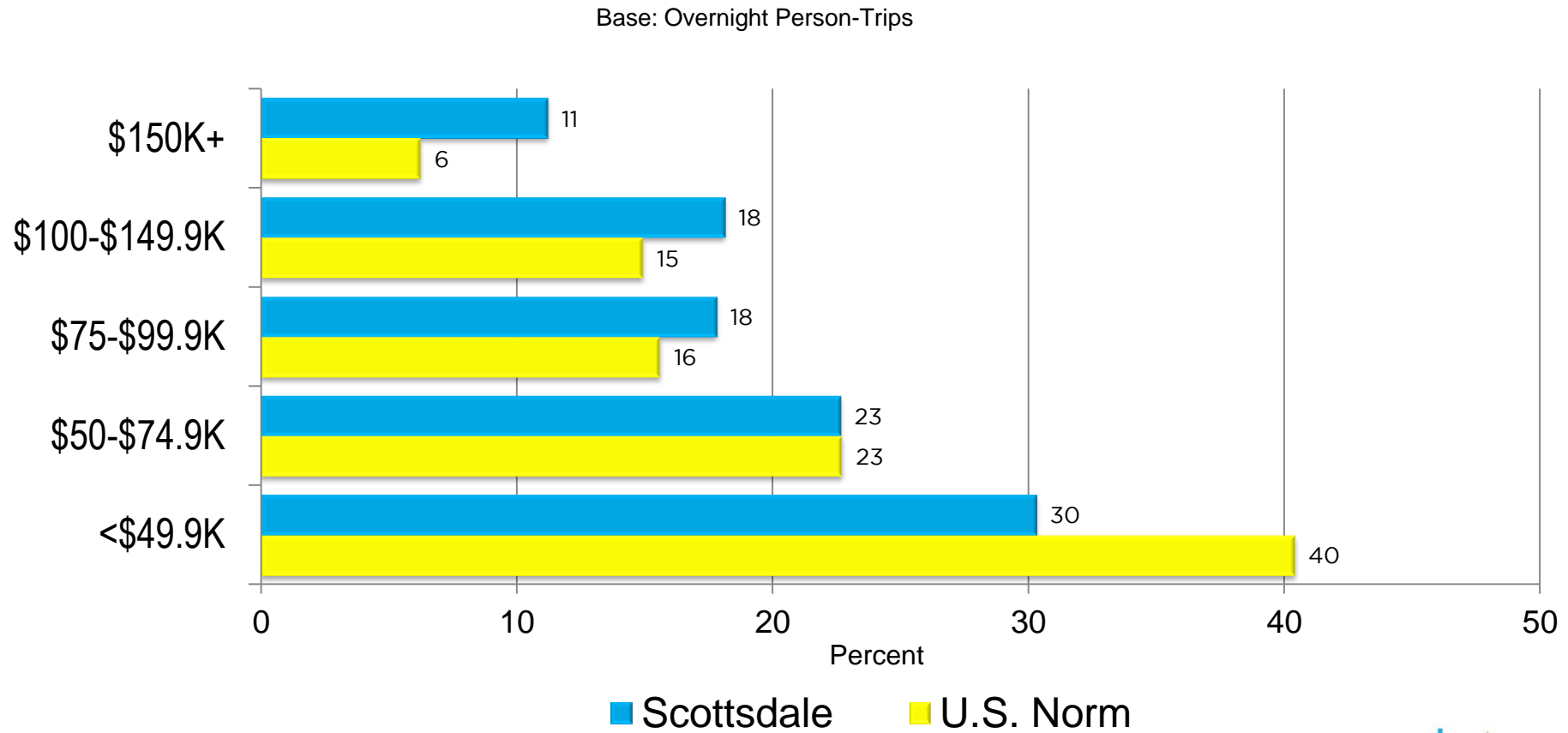
Activities and Experiences



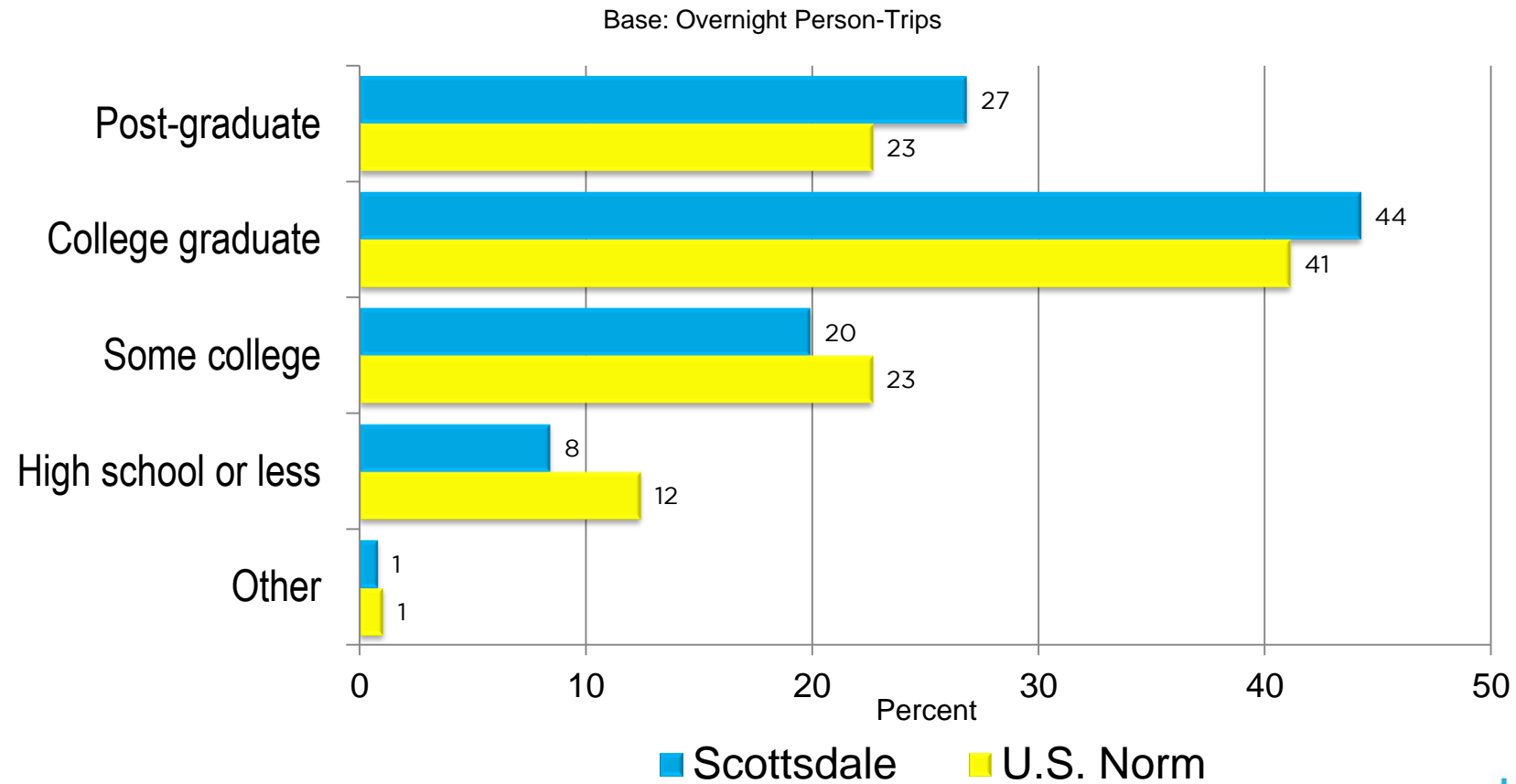
Age



Household Income



Education





Key Findings



Key Findings

- In 2017, Scottsdale had 8.9 million person trips, increasing 1.6% from 2016. 51% were overnight trips and 49% were day trips.
- The overnight trips generated \$1.263 billion in spending, increasing 3% from 2016.
- Visiting friends and relatives (at 44% - down from 46% in 2016) was the most frequent main purpose for an overnight trip to Scottsdale. Marketable trips (those influenced by marketing efforts) were at 39% (down slightly from 40% in 2016),

Key Findings (Cont'd)

- The top states of origin for visitors on overnight trips to Scottsdale were Arizona, California, and Colorado. Among DMAs, the top three overnight visitor sources were Phoenix, Los Angeles, and New York City.
- Overnight trips to Scottsdale are planned further in advance than the national average, with 67% planned two months or more ahead vs. 51% nationally.
- The average number of nights spent in Scottsdale on an overnight trip was 4.0 nights, down slightly from 4.1 nights in 2016.

Key Findings (Cont'd)

- Scottsdale has a much higher percentage of travelers using an airplane on an overnight trip (48% vs 23% nationally) or rental car (36% vs 17% nationally). Conversely, 47% of Scottsdale overnight travelers utilized their personal car or truck during the trip vs 68% nationally. The use of car services like Uber and Lyft on overnight trips to Scottsdale increased from 7% in 2015 to 12% in 2016 to 17% in 2017, while the use of a traditional taxi dropped from 11% to 6%.
- The top five activities and experiences during an overnight trip to Scottsdale were shopping, fine dining, swimming, landmark/historic site visits, and going to a bar or nightclub.

Thank You!